

Using Primo for searching Archives and Manuscripts: challenges and an approach

Richard Masters: IGeLU, Helsinki, 8 September 2009

Introduction

Today:

- Background to our *Integrating Archives and Manuscripts System* Project
- Description of the challenges in using Primo for resource discovery
- How we are approaching the solution

Archives and Manuscript Collections

Extensive collections of unique archives and manuscripts managed in separate collection areas:

- Manuscripts: *Western, Oriental and Music*
- Records of East India Company and its successors, and related private papers and manuscripts
- Digitised collections from the Endangered Archives Programme (EAP)
- British Library Corporate Archive



Fragmentation (1)

Collections managed separately from the Library's other collections in thematic *Collection Areas*:

- No single inventory and differing cataloguing traditions, practices and standards
- Some Catalogues in electronic form but in a number of online systems:
 - Molcat (Western and music manuscripts) on Library website
 - Endangered Archives Programme as web pages on Library website – not cross searchable
 - East India Company archive and related private papers on A2A managed by the National Archives
 - Others only available to users in the reading rooms

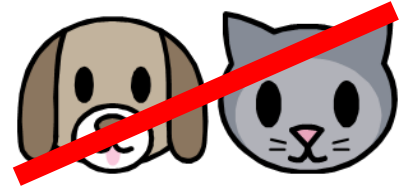
Fragmentation (2)

This means that:

- Material cannot be effectively exploited in the digital age as users cannot find what they want and when they do they cannot easily access digital manifestations of digitized and born-digital archives and manuscripts
- These resources cannot be searched together with our other resources, e.g. main catalogue, audio material, web archives, articles, ...

IAMS Project

*To deliver a powerful,
flexible integrated
cataloguing and resource
discovery system that will
unite and broaden access
to the British Library's
archives and manuscript
collections and will provide
standards compliant data
for external co-operative
projects*



IAMS Project Timetable

Modular system development:

- July 2009: Cataloguing
- October 2009: Resource Discovery (first 'beta' version)
- 2009-2010: Standardised Data Exchange
- 2010-2011: Digital Asset Management
- 2010-2011: Automated Requesting

Legacy Data Migration (2 million records):

- July 2009 - March 2011

IAMS Data Model

Internal development has allowed us to go back to basics and design a data model for cataloguing that:

- Caters for our business needs: not bibliographic LMS or flat archival system
- Takes what is best from traditional practice: archives *and* manuscripts!
- Makes best use of our legacy data
- Reflects latest developments in modelling and description standards
- Will enable users to *navigate* the catalogue as well as search it... eventually

What are Archives?

Archives are collections or groups of ‘records’ that are kept because they have ‘long-term value’

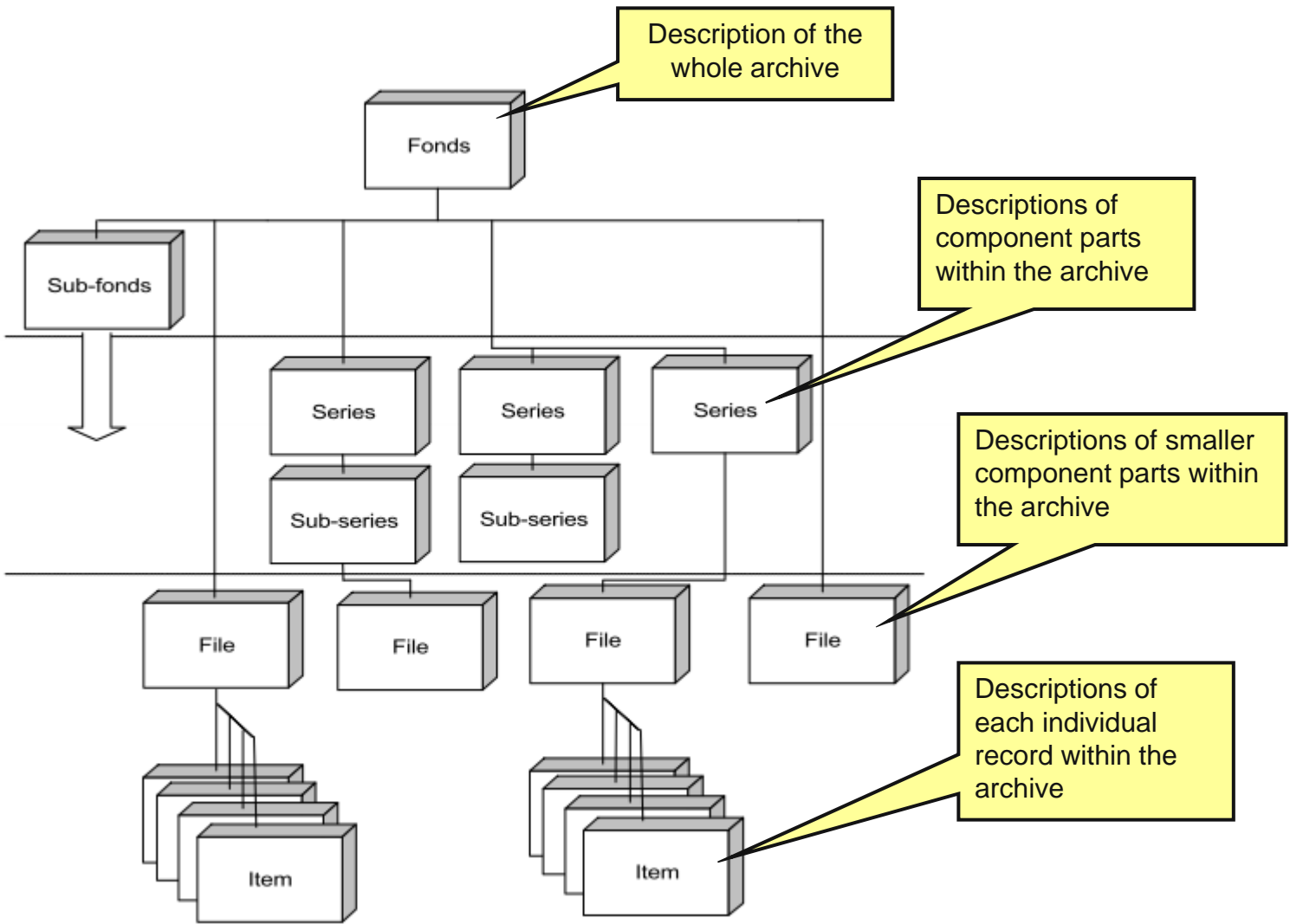
Records are created in the course of an activity that may be undertaken by an organization or an individual, and they form evidence of the activities that give rise to them

Archivists are concerned with providing the means through which individuals can access archives

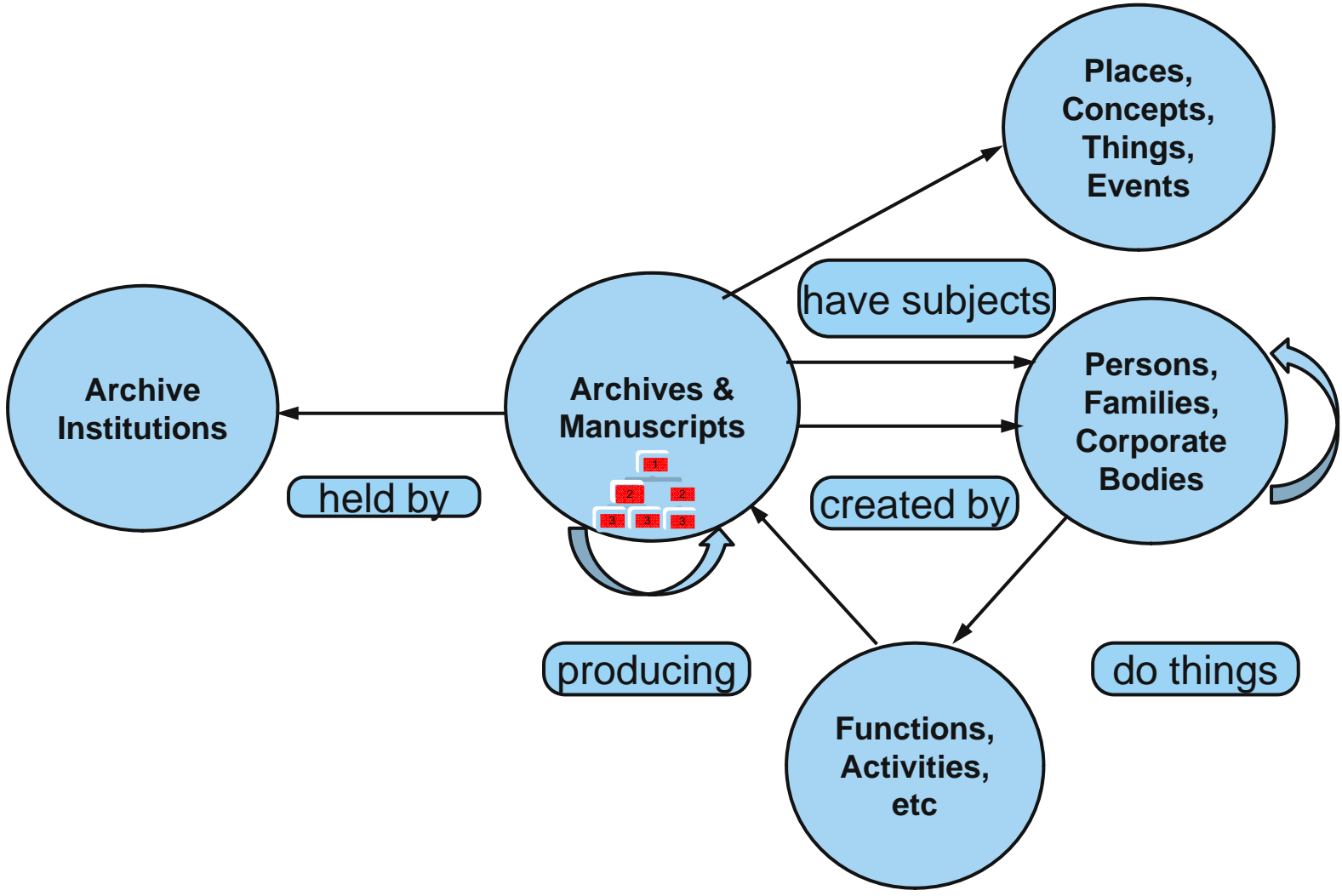
Archival description is the process of capturing, collating, analyzing and organizing any information that serves to identify, manage, locate and interpret the holdings of an archival institution and explain the contexts and record systems from which these holdings were selected (*Definition from the Society of American Archivists*)

Levels of Description in Archives

(Issue #1)

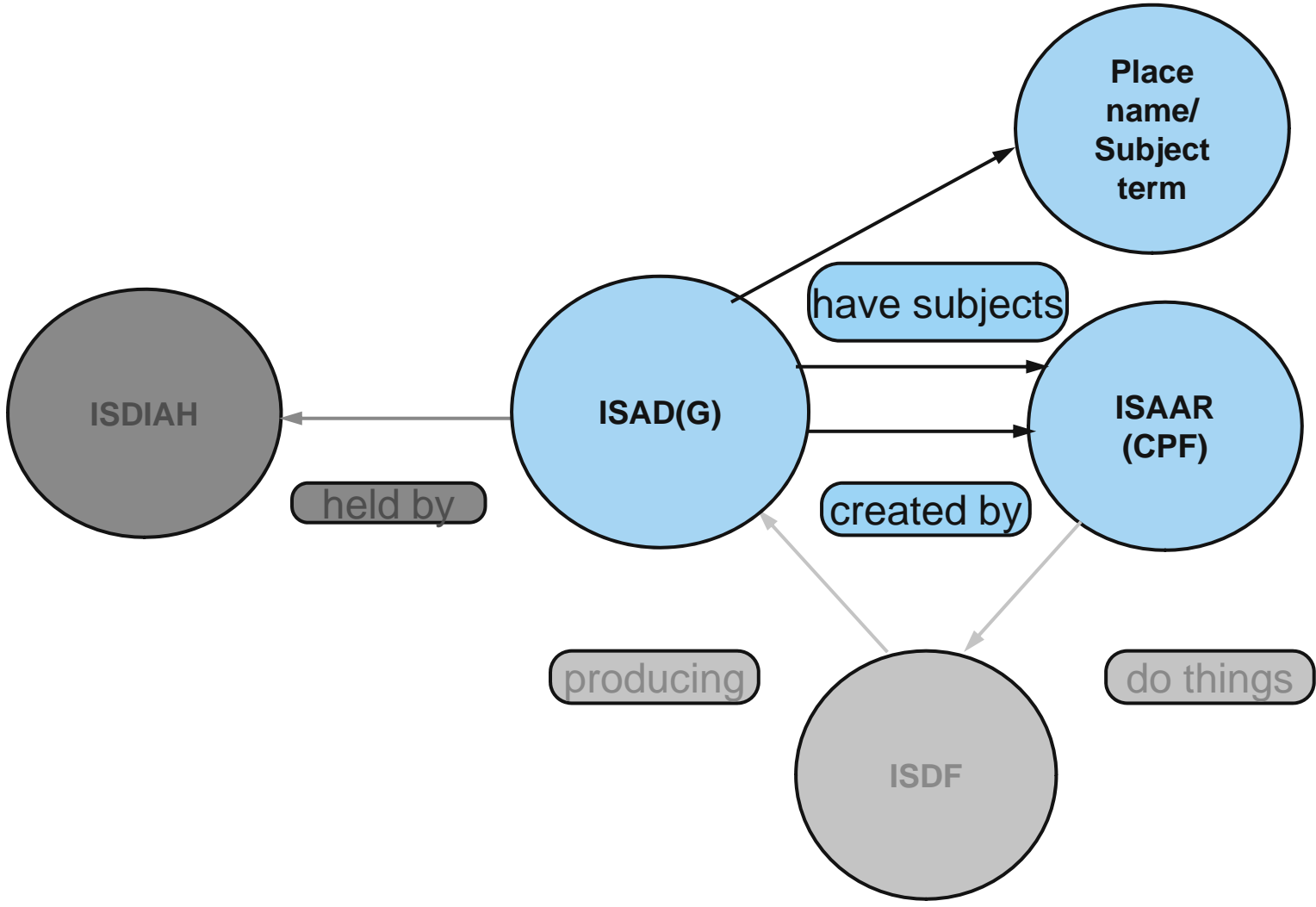


Descriptive Entities and Relationships: Model



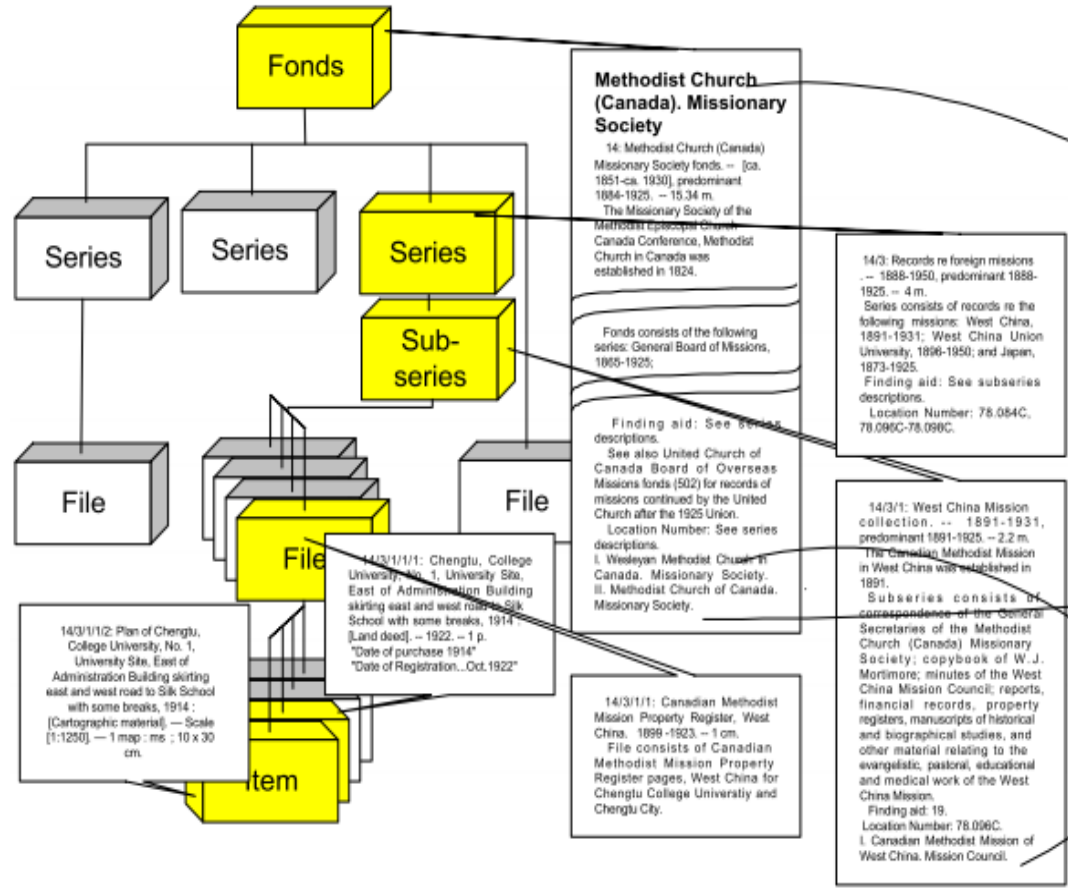
Descriptive Entities and Relationships: Standards

(Issue #2)



Example

Standardized archival description(s) according to ISAD(G) or compatible national rules



Archival authority records according to ISAAR(CPF) or compatible national rules

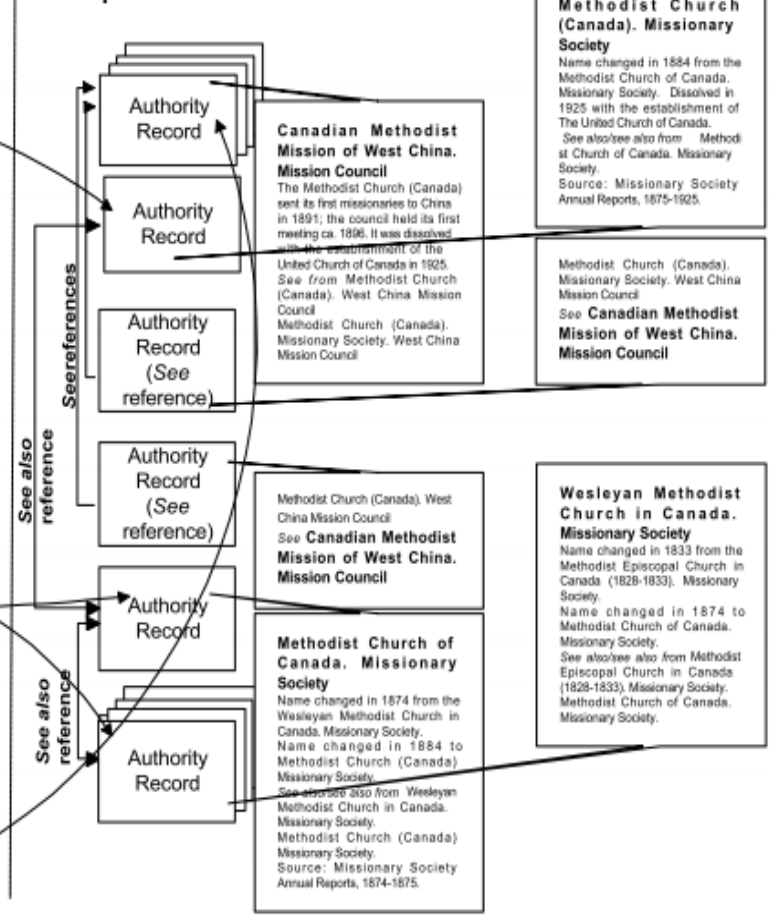


Chart designed and produced by Hugo L.P. Stibbe, c1998

ISAD(G) 2nd ed ICA 1999

Why Primo? (1)

- Original plan was for a two-level approach:
 - Primo for single, simple search of a subset of the IAMS data, also offering cross-collection searching across all British Library's collections (main catalogue, audio material, web archives, articles,...)
 - a separate search and navigation system for archives & manuscripts, offering full hierarchical browsing and taking account of the different records types

Why Primo? (2)

However,

- British Library policy is to use existing solutions – where fit for purpose – rather than build new systems
- Primo is our current strategic search tool, offering much of the modern search engine functionality and ‘Web 2.0’ features
- So: developed a prototype which the IAMS User Panel reviewed
- Approval to proceed to a live version, incorporating feedback

How? (1)

Initial implementation: develop separate instance of Primo for IAMS data

- Simple URL links between main *Search our Catalogue* service and *Search our Catalogue – Archives and Manuscripts*
- Complex set of rules defined for records published from IAMS
- Normalisation rules implement these rules to map IAMS published records to Primo PNX entries
- Different set of rules for archives, places, people, subjects

How? (2)

- Main facet is record type
 - Archive / Manuscript, Person, Family, Institution, Place






 - N.B. Main facet for *Search our Catalogue* is material type, e.g. book, journal, newspaper, web archive, ...

FACETS:

<ul style="list-style-type: none"> ■ Record Type ■ Material Type ■ Date ■ Language ■ Collection Area ■ Collection 	<ul style="list-style-type: none"> ■ Related Person ■ Related Family ■ Related Institution ■ Related Place ■ Related Subject ■ Creative Work ■ Level
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Archives & manuscripts in Primo

[N.B. The following screenshots are from an earlier prototype...]

IAMS Resource Discovery Prototype



Search for [GO](#)

Find me: that contain my query words anywhere in the record

[New Search](#) [Advanced Search](#)

Hello, Guest

[Sign in](#) for full access

[Guest workspace](#)

[? Help](#) [My Preferences](#)

Results for All Data in BL RSS

2,551 Results, sorted by:

1 [India Office Records \(View details\)](#)

1600-1948

Add to e-Shelf

[Check holdings at \(GetIt\)](#)

archive

Refine My Results

Narrow my results by limiting the search to:

Record Type:

- > [Archives \(2,542\)](#)
- > [Corporate Bodies \(8\)](#)

Archives & manuscripts in Primo

Search - results screen

2,551 Results, sorted by:

- 1 **India Office Records** [\(View details\)](#)
 1600-1948
 Add to e-Shelf Check holdings at [\(G\)](#)
- 2 **Papers of Sir Findlater Stewart, India Office official** [\(View details\)](#)
 1903-1960
 Add to e-Shelf Check holdings at [\(G\)](#)
- 3 **PZ 1673/39 Transmission of a gold medal from India to USSR via India Office** [\(View details\)](#)
 17 Mar 1939-24 Nov 1939
 Add to e-Shelf Check holdings at [\(G\)](#)
- 4 **Ext 2501/44 Telegram for Government of India sent in error to India Office** [\(View details\)](#)
 5 Jun 1944-6 Jun 1944
 Add to e-Shelf Check holdings at [\(G\)](#)
- 5 **Ext 1757/42 Messages to and from Foreign Office officials passing through the India Office** [\(View details\)](#)
 7 Apr 1942-21 Jul 1942
 Add to e-Shelf Check holdings at [\(G\)](#)

[N.B. This screenshot is from an earlier prototype]

First record:

Details

India Office Records

Related Subjects: [Colonial countries](#) ; [Government](#) ; [International relations](#) ; [International trade](#) ;

Scope and Content: The [India Office Records](#) comprise archives created and accumulated by the [India Office](#) (1858-1947) and its offshoot the [Burma Office](#) (1937-48), or inherited or otherwise acquired by the [India Office](#) from its predecessor bodies mainly the [East India Company](#) 1600-1858 and the [Board of Commissioners for the Affairs of India](#) (1784-1858); also archives created or acquired by the [India Office Records](#) acting as the successor to the [India](#) and [Burma Offices](#) in respect of their archives. The records relate to British commercial and political relations with [India](#), south and south-east Asia, and other countries with which the [East India Company](#) established contact; they also contain voluminous information on the British administrations in [India](#) and [Burma](#).

Creation Date: 1600-1948

Language: English

- [Parent record](#)
- [Child records](#)
- [Ordering page](#)

[N.B. This screenshot is from an earlier prototype]

2,551 Results, sorted by:

- 1

Archive
archive

[India Office Records](#) (View details)

1600-1948

Add to e-Shelf [Check holdings at](#) (G)
- 2

Archive
archive

[Papers of Sir Findlater Stewart, India Office official](#) (View details)

1903-1960

Add to e-Shelf [Check holdings at](#) (G)
- 3

Archive
archive

[PZ 1673/39 Transmission of a gold medal from India to USSR via India Office](#) (View details)

17 Mar 1939-24 Nov 1939

Add to e-Shelf [Check holdings at](#) (G)
- 4

Archive
archive

[Ext 2501/44 Telegram for Government of India sent in error to India Office](#) (View details)

5 Jun 1944-6 Jun 1944

Add to e-Shelf [Check holdings at](#) (G)
- 5

Archive
archive

[Ext 1757/42 Messages to and from Foreign Office officials passing through the India Office](#) (View details)

7 Apr 1942-21 Jul 1942

Add to e-Shelf [Check holdings at](#) (G)

[N.B. This screenshot is from an earlier prototype]

Second record:

Details

Papers of Sir Findlater Stewart, [India Office](#) official

Related People: [Stewart, Sir, Samuel, Findlater, 1879-1960, India Office official](#) ;

Scope and Content: Stewart Collection: papers of Sir (Samuel) Findlater Stewart (1879-1960), [India Office](#) 1903-40, Permanent Under-Secretary of State for [India](#) 1930-40, seconded for various wartime duties 1940-45, comprising private and demi-official correspondence, miscellaneous papers (including printed volume of biographical sketches of delegates to the Indian Round Table Conference) and photographs.

Creation Date: 1903-1960

Language: English

- [→ Parent record](#)
- [→ Child records](#)
- [→ Ordering page](#)

[N.B. This screenshot is from an earlier prototype]

2,551 Results, sorted by:

- 1

Archive
archive

[India Office Records](#) (View details)

1600-1948

Add to e-Shelf [Check holdings at](#) (G)
- 2

Archive
archive

[Papers of Sir Findlater Stewart, India Office official](#) (View details)

1903-1960

Add to e-Shelf [Check holdings at](#) (G)
- 3

Archive
archive

[PZ 1673/39 Transmission of a gold medal from India to USSR via India Office](#) (View details)

17 Mar 1939-24 Nov 1939

Add to e-Shelf [Check holdings at](#) (G)
- 4

Archive
archive

[Ext 2501/44 Telegram for Government of India sent in error to India Office](#) (View details)

5 Jun 1944-6 Jun 1944

Add to e-Shelf [Check holdings at](#) (G)
- 5

Archive
archive

[Ext 1757/42 Messages to and from Foreign Office officials passing through the India Office](#) (View details)

7 Apr 1942-21 Jul 1942

Add to e-Shelf [Check holdings at](#) (G)

[N.B. This screenshot is from an earlier prototype]

Third record:

Details

PZ 1673/39 Transmission of a gold medal from India to USSR via India Office

Related Subjects: [Colonial countries](#) ; [Government](#) ; [International relations](#) ; [International trade](#) ;

Creation Date: 17 Mar 1939-24 Nov 1939

Language: English

- [→ Parent record](#)
- [→ Child records](#)
- [→ Ordering page](#)

[N.B. This screenshot is from an earlier prototype]

Archives & manuscripts in Primo

Facets

Refine My Results

Narrow my results by limiting the search to:

Record Type:

- > [Archives \(2,542\)](#)
- > [Corporate Bodies \(8\)](#)
- > [People \(1\)](#)

Related Subject:

- > [International trade \(2,541\)](#)
- > [Colonial countries \(2,541\)](#)
- > [Government \(2,541\)](#)
- > [International relations \(2,541\)](#)

Collection:

- > [India Office Records \(2,541\)](#)
- > [Private Papers \(1\)](#)

Access Conditions and Date:

- > [Unrestricted \(2,517\)](#)
- > [Available for research unless otherwise stated \(5\)](#)

Legal Status:

- > [Public Record\(s\) \(2,541\)](#)
- > [Not Public Record\(s\) \(1\)](#)

[N.B. This screenshot is from an earlier prototype]

SEARCH OUR CATALOGUE

ARCHIVES AND MANUSCRIPTS

Search for

GO >

Find me: that contain my query words

[New Search](#)

[Advanced Search](#)

Dev Server

This test site allows you to search and view the details of 13 million books and other material much more simply than ever before. We will be developing the service further in coming months. Try it out, then [tell us what you think](#)

Hello, Guest

[Sign in](#) for full access

Guest workspace /11

? [Help](#)

[My Preferences](#)

SEARCH OUR CATALOGUE

ARCHIVES AND MANUSCRIPTS

Search for

GO

Find me: that contain my query words

[New Search](#)

[Advanced Search](#)

Hello, Guest

[Sign in](#) for full access

[Guest workspace](#)

[? Help](#)

[My Preferences](#)

Results for All Data in BL

RSS

302 Results, sorted by:

1 [Stewart, Sir, Samuel, Findlater, 1879-1960, India Office official](#) [\(View details\)](#)

Add to e-Shelf

[Check holdings at](#) [\(Getit\)](#)

Person

person

2 [Williams, Joan Ursula, Vaughan, 1911-2007, formerly Wood née Lock, writer and musical patron](#) [\(View details\)](#)

Add to e-Shelf

[Check holdings at](#) [\(Getit\)](#)

Person

person

3 [Kennedy, Donald Gilbert, 1898-1976, colonial administrator](#) [\(View details\)](#)

Add to e-Shelf

[Check holdings at](#) [\(Getit\)](#)

Person

person

4 [Hughes, Thomas Lewis, 1897-1980, civil servant](#) [\(View details\)](#)

Add to e-Shelf

[Check holdings at](#) [\(Getit\)](#)

Person

person

Refine My Results

Narrow my results by limiting the search to:

Record Type:

- > [Archives \(286\)](#)
- > [People \(14\)](#)
- > [Corporate Bodies \(2\)](#)

Language:

- > [English \(285\)](#)
- > [Hindi \(1\)](#)

Related Subject:

- > [International trade \(283\)](#)
- > [Colonial countries \(283\)](#)
- > [Government \(283\)](#)
- > [International relations \(283\)](#)

Gender:

- > [Female \(2\)](#)

SEARCH OUR CATALOGUE

ARCHIVES AND MANUSCRIPTS

Advanced Search

Any	contains	
Any	contains	
Publication Date:		Any year
Material Type:		All items
Language:		Any language

GO >

[New Search](#)

[Simple Search](#)

Dev Server

This test site allows you to search and view the details of 13 million books and other material much more simply than ever before. We will be developing the service further in coming months. Try it out, then [tell us what you think](#)

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? [Help](#)

[My Preferences](#)

Summary (1)

- Major data model challenges:
 - Multiple levels in hierarchy (e.g. not like Aleph)
 - Fundamentally different record types: archival description v authority records (people, places, subjects).
 - These authority records are NOT organisation-wide
- Issue with order of results
 - The order in which records are displayed is important to the understanding of the archive, but it is not based on date or relevance
- Data!
- Current work
 - Implementing the major revision of normalisation rules for mapping from IAMS data model to PNX
 - Configuration of screens

Summary (2)

Future:

- Continuous improvement in service, reacting to user feedback
- Review acceptability of this solution and need for hierarchical browser
- Unify the *Search our Catalogue* service
 - Enable single search across all material types
 - But retain targeted searching for Archives & Manuscripts
- Review changes coming in Primo v3 for incompatibility issues, or new functionality that might help solve the problems
- Challenge of plan to integrate archival description and manuscript (works) description: TEI v. ISAD(G)

Contact

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